



# Quick Reference Guide 10

## Outlook 2013 for Windows

### Folder Sharing and Delegation



#### Folder Sharing vs. Delegation

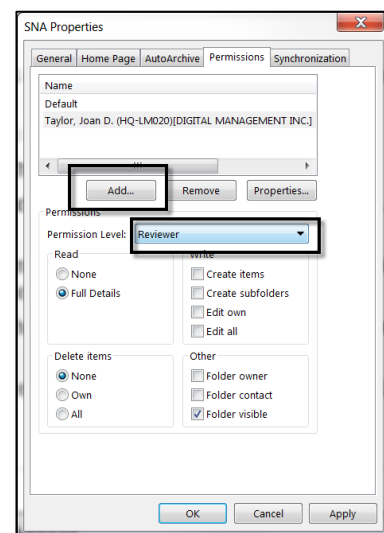
Two NASA Outlook 2013 users can share their Outlook folders with each other. **Folder Sharing** is one of the collaborative features of Outlook. When granting access to your Outlook folders to another Outlook user, you control whether the delegate has read-only or more advanced permissions. By default, items you mark as **Private** cannot be accessed by anyone else.

**Delegation** is a more advanced feature than just sharing Outlook folders. If you want to grant additional permissions, such as allowing a delegate the ability to create e-mail messages or respond to meeting requests on your behalf, you must use **Delegate Access**.

#### Folder Sharing

##### Share an E-mail Folder

1. From the Folder List in the *Navigation*, **right-click on the folder** to be shared. A shortcut menu displays.
2. Click **Properties**. The *Properties* dialog box displays (shown right).
3. Click **Permissions Tab | Add**. The *Add Users* dialog box displays.
4. Enter a **search term** in the **Search** field and click **Go** or press **ENTER**. A search result will display.
5. Select the appropriate name from the resulting list and click **Add**. Click **OK**. The name will be displayed in the **Name** box.
6. Select the appropriate name in the **Name** box and click the **Permission Level** drop-down arrow.
7. Select the appropriate permissions level from the Sharing Permission Levels table below.
8. Click **OK** when complete.



##### Sharing Permission Levels

Permission Level	Rights Access
None	None
Owner	Same as mailbox owner
Publishing Editor	Read full details, create items, create subfolders, edit all, folder visible and delete all
Editor	Read full details, create items, edit all, folder visible and delete all
Publishing Author	Read full details, create items, create subfolders, edit own, folder visible and delete own
Author	Read full details, create items, edit own, folder visible and delete own
Non-editing Author	Read full details, create items, folder visible and delete own
Reviewer	Read full details, folder visible and delete none
Contributor	Read full details, create items, folder visible and delete none

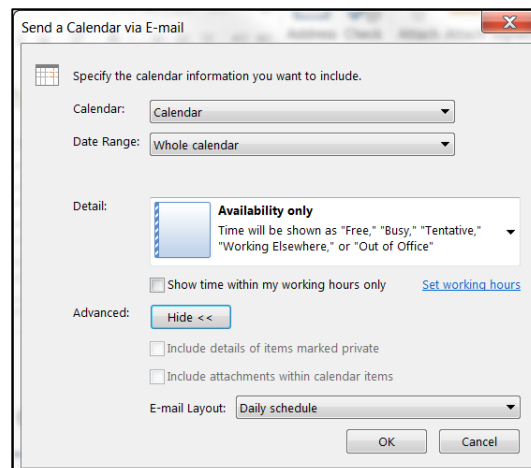


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*This document is posted on the ITCD Web site <http://itcd.hq.nasa.gov/ctc>.*

### Share a Calendar by E-mail

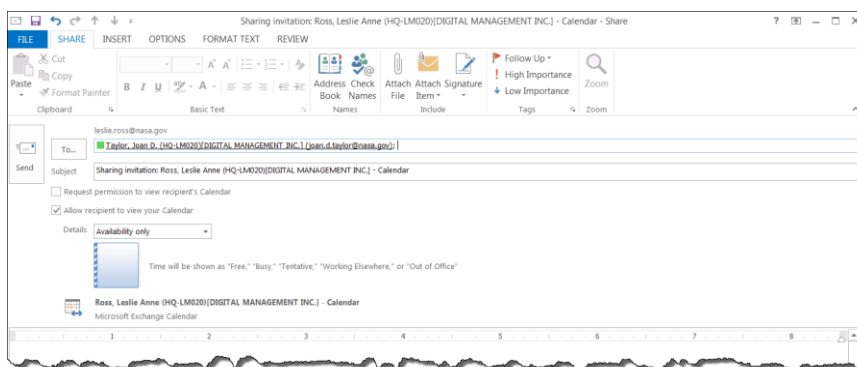
1. To forward your **Calendar** via e-mail, first display the **Calendar** and then click on **Home Tab | E-mail Calendar**. An e-mail message displays along with the *Send a Calendar via E-mail* dialog box (shown right).
2. Click the **Calendar drop-down arrow** and select the **Calendar** to be shared.
3. Click the **Date Range drop-down arrow** and select from the options **Today**, **Tomorrow**, **Next 7 days**, **Next 30 days**, **Whole calendar**, or **Specify date** to enter a **Start** and **End** date for the date range.
4. Click the **Detail drop-down arrow** and select **Availability only**, **Limited details** or **Full details**.
  - a. When **Detail** is set to **Availability only**, click the **checkbox** to enable/disable **Show time within my working hours only**.
  - b. Click **Show** to display the **Advanced** options:
    - **Include details of times marked private.**
    - **Include attachments with calendar items.**
    - Click the **drop-down arrow** for **E-mail Layout** to select the **Daily schedule** or **List view**.
5. Click **OK** when done.
6. **Address** and **send** the e-mail message normally.



### Share a Calendar

1. To share your **Calendar**, first display the **Calendar** and then click **Home Tab | Share Calendar**. A *Sharing Invitation E-mail* displays (shown right).

*To share a Calendar you created and therefore is not your default Calendar: in the Folder list in the Navigation, right-click the Calendar | Share | Calendar.*



2. In the **To** field, enter the name of the person who you want to share with.
3. Click to enable/disable **Request permission to view recipient's Calendar** or **Allow recipient to view your Calendar**.
4. Click the **Detail drop-down arrow** and select **Availability only**, **Limited details** or **Full details**.
5. **Address** and **send** the e-mail message normally.

### Delegation

**Delegate Access** is most commonly used between a manager and his or her assistant, where the assistant (delegate) is responsible for processing the manager's incoming meeting requests and coordinating the manager's schedule.

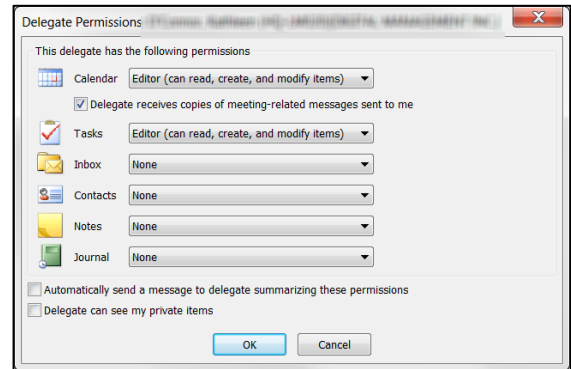
Setting up a delegate (someone granted permission to open another person's folders, create items, and respond to requests for that person) enables an assistant to receive and respond to meeting requests or responses and send e-mail messages on the manager's behalf.

The **Delegator** grants permission to Outlook folders they wish their delegate to access and grant a rights level for making changes. The manager can also grant additional permissions that allow their delegate to read, create, or have full control over items in the manager's mailbox. Additionally, **Delegators** can grant access rights to private items.

*You and the delegate must use the same version of Office Outlook.*

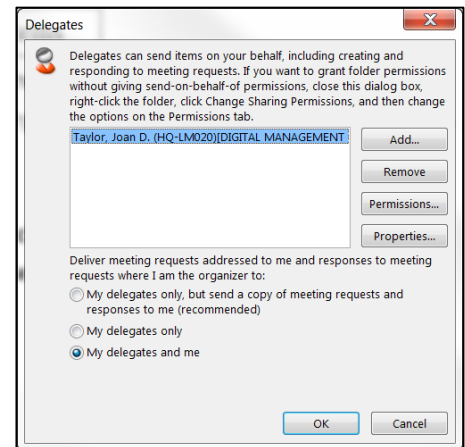
### Grant Delegate Access

1. Click **File | Info | Account Settings | Delegate Access**. The *Delegates* dialog box displays.
2. Click **Add**. The *Add Users* dialog box displays.
3. Enter a **search term** in the **Search** field and click **OK** or press **ENTER**. A search result displays
4. Select the **appropriate name** from the search result.
5. Click **Add | OK**. The *Delegate Permissions* dialog box displays (shown right).
6. Click the **drop-down arrows** for each Outlook Folder and select the permissions level from the list provided. See below.



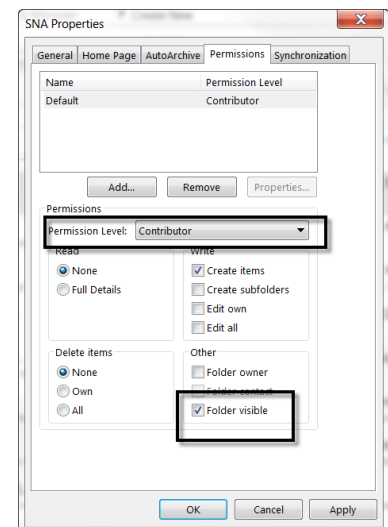
Permission Level	Access Rights
Reviewer	Read items
Author	Read and Create items
Editor	Read, create and modify items

7. Click the **checkbox** to enable/disable **Delegate receives copies of meeting-related messages sent to me**.
8. Click the **checkbox** to enable/disable **Automatically send a message to delegate summarizing these permissions**.
9. Click the **checkbox** to enable/disable **Delegate can see my private items**. Click **OK** when done. Your screen will return to the *Delegates* dialog box (shown right).
10. Click the appropriate checkbox for **meeting request delivery** by clicking the **checkbox** to enable/disable:
  - a. **My delegates only, but send a copy of meeting requests and responses to me (recommended);**
  - b. **My delegates only;** or
  - c. **My delegate and me.**
11. Click **OK**.



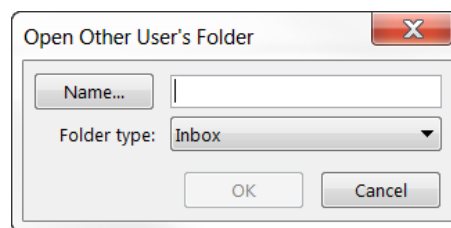
### Enable Delegate to Add Your Folders in their Folder List in Navigation

1. From the Folder List in the *Navigation*, **right-click on your name** at the top of your Outlook folders. A shortcut menu displays.
2. Click **Properties**. The *Properties* dialog box displays (shown right).
3. Click **Permission Tab | Add**. The *Add Users* dialog box displays.
4. Enter a **search term** in the **Search** field and click **Go** or press **ENTER**. A search result displays.
5. Select the **appropriate name** from the list and click **Add**. Click **OK**. The *Properties* dialog box will display again with the name displayed in the **Name** box.
6. Select the appropriate name in the **Name** box and click the **Permissions level drop-down arrow**.
7. Select the appropriate permissions level from the Sharing Permission Levels table on page 1. Every permission level except "None" includes the permission to make your folder visible in their Folder List.
8. Click **OK** when complete.



### Open Other User's Folder

1. Click **File Tab | Open & Export | Other User's Folder**. The *Open Other User's Folder* dialog box displays (shown right).
2. Click **Name**. The *Select Name* dialog box displays.
3. Enter a **search term** in the **Search** field and click **Go** or press **ENTER**.
4. Select the appropriate name from the resulting list and click **Add**. The *Other User's Folder* dialog box displays again.
5. Click the **Folder type drop-down arrow** and select the Outlook folder type.
6. Click **OK**.



### Display Other User's Folder in Folder List in Navigation

1. Click **File Tab | Info | Account Settings | Account Settings**. The *Account Settings* dialog box displays.
2. Highlight your **e-mail account** in the E-mail Tab list box and click **Change**. The *Change Account* dialog box displays.
3. Click **More Settings | Advanced | Add**. The *Add Mailbox* dialog box displays.
4. Type the name of the Mailbox in the **Add Mailbox** field. Click **OK**. The mailbox will now be displayed in the **Open these additional mailboxes** list.
5. Click **OK | Next | Finish | Close**. The other user's folders will not display in the Folder list in the Navigation of your Outlook.

*You may have to close Outlook and re-open the application for the Folder List in the Navigation to refresh.*

### Send mail on behalf of

1. In a new e-mail message, click the **From drop-down arrow** and select the **Delegator's** name.
2. **Address** and **send** the e-mail normally.

*When the message arrives in the recipient's inbox, the sender's name displays as the Delegator's name. When the recipient open the message, however, the from line will read as from [Delegate] on behalf of [Delegator].*

